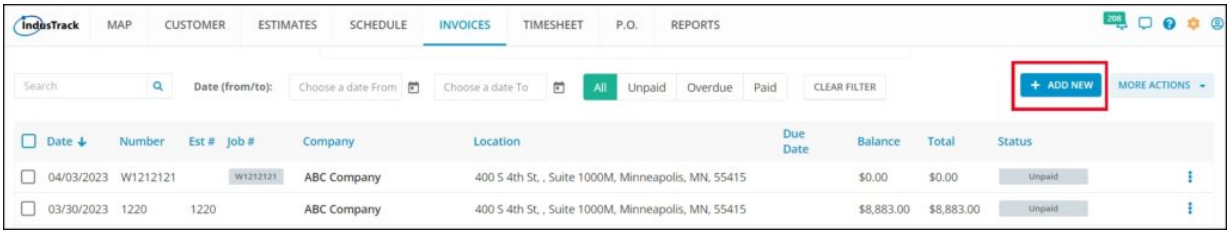


# Creating Estimates

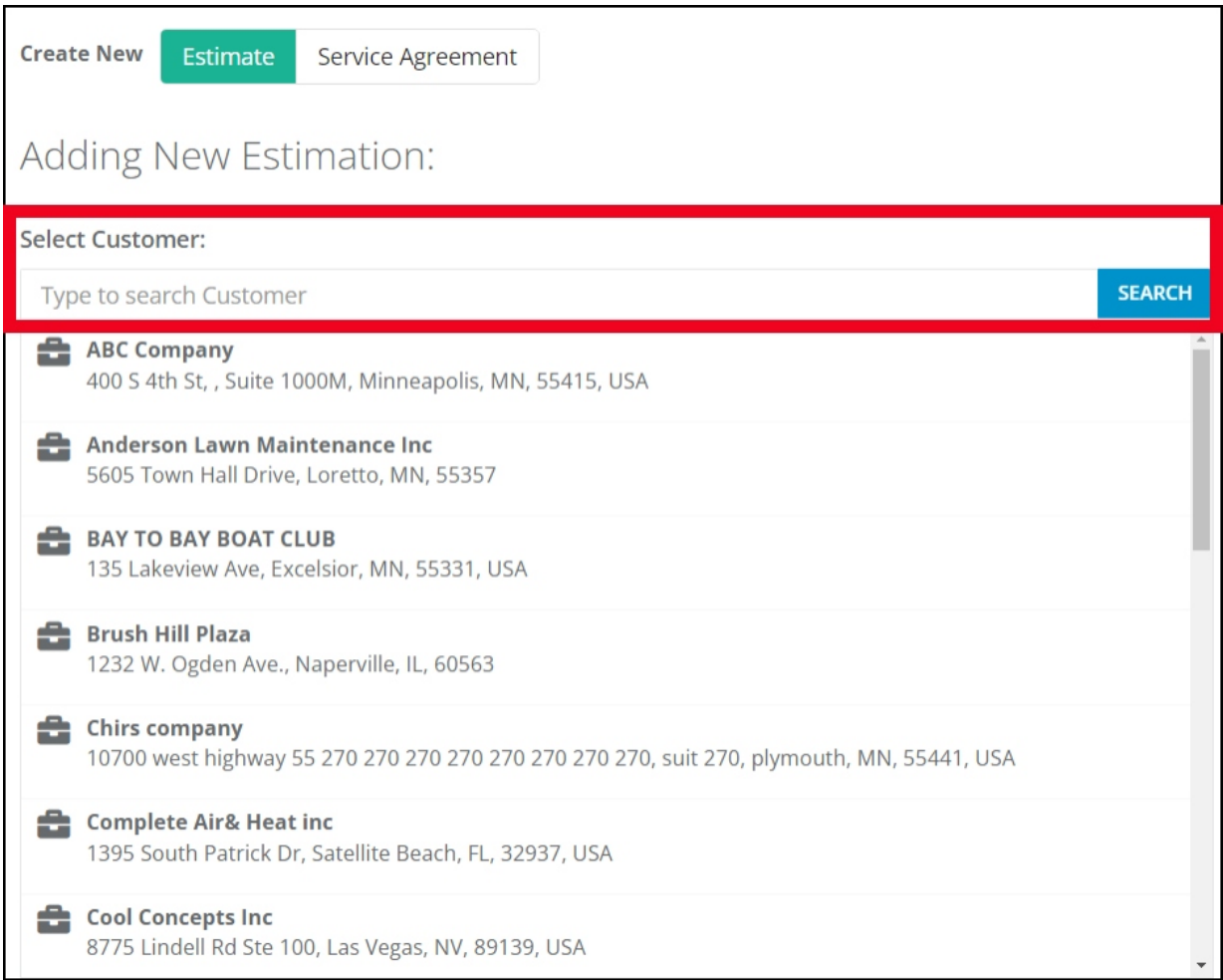
Estimates can be created from either the Customer or the Estimates modules.

## Create an Estimate from the Estimates Module

Click the Add New button at the upper right-hand corner of the estimate page.



Select the customer from the list.



If there are multiple service locations, select the correct one.

Service Locations:

**John Wilson**  
400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415, USA

**Location 2, Tori walker**  
10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA

Create New **Estimate** Service Agreement

Adding New Estimation:

Select Customer:

**ABC Company**  
400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415, USA

**Anderson Lawn Maintenance Inc**  
5605 Town Hall Drive, Loretto, MN, 55357

**BAY TO BAY BOAT CLUB**  
135 Lakeview Ave, Excelsior, MN, 55331, USA

**Brush Hill Plaza**  
1232 W. Ogden Ave., Naperville, IL, 60563

**Chirs company**  
10700 west highway 55 270 270 270 270 270 270 270, suit 270, plymouth, MN, 55441, USA

**Complete Air& Heat inc**  
1395 South Patrick Dr, Satellite Beach, FL, 32937, USA

**Cool Concepts Inc**  
8775 Lindell Rd Ste 100, Las Vegas, NV, 89139, USA

Service Locations:

**John Wilson**  
400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415, USA

**Location 2, Tori walker**  
10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA

Click **Proceed** to complete the Estimate details.

The **Estimate Page** will come up. Fill in the details to create your estimate.

**General:**

Description:

Created:03/30/2023

Proposal template:

**Bill To:**

12345  
ABC Company  
**John Wilson**  
400 S 4th St, , Suite 1000M  
Minneapolis, MN 55415  
6127464017  
sales@industrack.com

**Service Location:**

**John Wilson**  
400 S 4th St, , Suite 1000M  
Minneapolis, MN 55415  
6127464017  
sales@industrack.com

**Estimation Summary:**

Total Cost: \$ 0.00  
Total Price: \$ 0.00  
Profit:

Name	Description	Qty	Unit Cost	Profit	Unit Price	Total Cost	Price	Discount	Total
<input type="text" value="Type to search"/>									0.00
Subtotal:						0	%	\$0.00	\$ 0

Notes for Customer:

Subtotal: \$0.00

Discount: Add

Tax: Not selected 0.00% \$0.00

**TOTAL : \$0.00**

Description and Proposal Template

Under **General**, the description field will be filled up by default. You can revise the description if you prefer a different one. Proposals can be included in the estimates which can be added from the settings  
Settings > Templates > Proposal Templates

Draft

ACTIONS

General:

Description:

Air filter Estimate

Created:03/30/2023

Proposal template:

jorji templateeee

Bill To:

12345

ABC Company

John Wilson

400 S 4th St , Suite 1000M

Minneapolis, MN 55415

6127464017

sales@industrack.com

Service Location:

John Wilson

400 S 4th St , Suite 1000M

Minneapolis, MN 55415

6127464017

sales@industrack.com

Estimation Summary:

Total Cost:

\$ 300.00

Total Price:

\$ 20.00

Profit:

Estimate Details

Search Field will come up on your estimate.

To fill up the inventory block, click on the search **bar** and find the items, Inventory, equipment's the service or labor hours you want from the list and click on it. You can also search by typing in the name or number/code of the item, labor or service.

Name	Description	Qty	Unit Cost	Profit	Unit Price	Total Cost	Price	Discount	Total
Type to search									
09090 - 01 Plans and Permits			Subtotal:		0	%	\$0.00		\$ 0
Service									
Plans and Permits									
01.1 Plans									
Service									
Plans									
01.2 Building Permits									
Service									
Building Permits									
01.3 City License									
Service									

Subtotal:

\$0.00

Discount:

Add

Tax:

Not selected 0.00%

\$0.00

The other fields will auto-fill depending on your selection.  
In order to learn how to add items in inventory, please view Inventory Items.

Once you have selected the item that you want, set the quantity by clicking the arrows on the **QTY** field or by highlighting the number and typing in the desired quantity. You can also do the same for discount by adding value in the **Discount** section. The **Total Cost** and **Total Price** fields will auto-compute

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

Name	Description	Qty	Unit Cost	Profit	Unit Price	Total Cost	Price	Discount	Total
26 Landscaping	26 Landscaping & Paving	1	\$ 200	25 %	\$ 250	\$200.00	\$250.00	\$2.50	\$247.50
24 Paint	Painting	1	\$ 300	8.33 %	\$ 325	\$300.00	\$325.00	\$3.25	\$321.75
Type to search									
Subtotal:			13.85	%		\$500.00			\$ 569.25

Notes for Customer:

Subtotal: \$569.25  
Discount: \$5.69  
Tax: Not selected 0.00% \$0.00  
**TOTAL : \$563.56**

Repeat these steps for each item you want to add to the estimate.

As you add items to your estimate, the **Subtotal fields** and the **Estimation Summary** will auto-calculate.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

**General:**  
Description: House Estimates  
Created: 04/01/2023  
Proposal template: Default template

**Bill To:**  
12345  
ABC Company  
John Wilson  
400 S 4th St., Suite 1000M  
Minneapolis, MN 55415  
6127464017  
sales@industrack.com

**Service Location:**  
John Wilson  
400 S 4th St., Suite 1000M  
Minneapolis, MN 55415  
6127464017  
sales@industrack.com

**Estimation Summary:**  
Total Cost: \$ 500.00  
Total Price: \$ 563.56  
Profit: 12.71 %

Name	Description	Qty	Unit Cost	Profit	Unit Price	Total Cost	Price	Discount	Total
26 Landscaping & Paving	26 Landscaping & Paving	1	\$ 200	25 %	\$ 250	\$200.00	\$250.00	\$2.50	\$247.50
24 Paint	Painting	1	\$ 300	8.33 %	\$ 325	\$300.00	\$325.00	\$3.25	\$321.75
Type to search									
Subtotal:			13.85	%		\$500.00			\$ 569.25

Notes for Customer:

Subtotal: \$569.25  
Discount: \$5.69  
Tax: Not selected 0.00% \$0.00  
**TOTAL : \$563.56**

# Totals, Discounts, Taxes and Notes

After adding the estimate details, finish off the estimate by adding a discount and setting the tax(if applicable) on the total estimate.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

Name	Description	Qty	Unit Cost	Profit	Unit Price	Total Cost	Price	Discount	Total
26 Landscaping	26 Landscaping & Paving	1	\$ 200	25 %	\$ 250	\$200.00	\$250.00	\$2.50	\$247.50
24 Paint	Painting	1	\$ 300	8.33 %	\$ 325	\$300.00	\$325.00	\$3.25	\$321.75
Type to search									
Subtotal:			13.85	%		\$500.00			\$ 569.25

Notes for Customer:

Subtotal: \$569.25  
Discount: \$5.69  
Tax: Not selected 0.00% \$0.00  
**TOTAL : \$563.56**

On the **Set Discount window**, enter the value of the discount. Indicate if the entered value is a dollar amount or a percentage discount. Select this from the drop-down and **Save** the discount.

Set Discount

X

Value

10

%

▼

%

\$

CLOSE

SAVE

The discount will be added to the estimate.

If there are any notes that you need to add to the estimate, add these on the **Notes for Customer** field.

Notes for Customer:

Subtotal:

\$9,400.00

Discount:

\$940

Tax:

MN

5.00%

\$423.00

TOTAL :

\$8,883.00

**Save the New Estimate**

Click the **Save button from** action drop down to save the new estimate. The estimate will remain open on the screen, and you can continue working on it. To save and exit the estimate and go to the Action drop down click the **Save and Close button**.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

Draft

**General:**

Description: House Estimates

Created: 04/01/2023

Proposal template: Default template

**Bill To:**

12345  
ABC Company  
John Wilson  
400 S 4th St, Suite 1000M  
Minneapolis, MN 55415  
6127464017  
sales@industrack.com

**Service Location:**

John Wilson  
400 S 4th St, Suite 1000M  
Minneapolis, MN 55415  
6127464017  
sales@industrack.com

**Estimation Summary**

Total Cost: \$ 500.00  
Total Price: \$ 563.50  
Profit: 12.71 %

**ACTIONS**

- Save
- Save and Close
- Preview
- Send to e-mail
- Convert to job
- Convert to invoice
- Mark as Won
- Mark as Lost
- Mark as Draft
- Copy

Name	Description	Qty	Unit Cost	Profit	Unit Price	Total Cost	Price	Discount
26 Landscaping	26 Landscaping & Paving	1	\$ 200	25 %	\$ 250	\$200.00	\$250.00	\$2.50
24 Paint	Painting	1	\$ 300	8.33 %	\$ 325	\$300.00	\$325.00	\$3.25

Other option shown under **Action Button** are discussed under the different article here **Managing Estimates** section.

Your recently created estimate will be displayed in the Estimate module.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET P.O. REPORTS

208

Last 30 Days

Won \$ 9,015,343.35

Lost \$ 0.00

Pending \$ 916,523.00

Search

Date (from/to): Choose a date From Choose a date To All CLEAR FILTER

+ ADD NEW MORE ACTIONS

Number	Company	Location	Description	Date	Created By	Value	Status
1220	ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	House Estimate	03/30/2023	Raz Bajwa	\$8,883.00	Draft

